



Breaking New Ground
Strategic Plan
2016-2019

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BREAKING NEW GROUND **THE OSA STRATEGIC PLAN** **2016 – 2019**

A. OVERVIEW

Breaking New Ground, The Oakland School for the Arts’ Strategic Plan discusses the school’s goals and objectives for the period of August 2016 through June 2019 (three complete academic years). The plan details the priorities set by the OSA Leadership Team and the Board of Directors, and the strategies that will be employed to meet these goals. Financial projections and incremental costs associated with initiatives contained in this plan, and supporting materials for many of the plan’s references, are included in the addenda at the end of the document.

B. BACKGROUND

Oakland School for the Arts (OSA) is a public charter school founded in 2002 by Oakland’s then-Mayor and current California Governor, Jerry Brown. Housed in Downtown Oakland’s historic Fox Theater and annex sites within a four-block radius that include the iconic Sweet’s Ballroom, Piedmont Piano Company, and the collective of local theater companies known as *The Flight Deck*, OSA currently serves 725 students in grades 6 through 12. Students are accepted based on the quality of their artistic auditions and the demonstration of potential in a given arts field. Academic grades are not used as criteria for admission and attendance is tuition free. One in four auditioning students receives an admission offer to the school. Annually, 150-175 spots open up (115 for 6th grade, 30+ for 9th grade and a small amount of attrition allows for entry at other grade levels). The school often sees upwards of 700 applicants. Students come from the Bay Area and beyond (as far away as Fairfield, San Jose and Stockton).

During the 2015 charter renewal process, OSA and Oakland Unified School District, the authorizing body to whom OSA must petition for renewal every five years, agreed to an informal goal of enrolling students using a 2:1 ratio of Oakland to non-Oakland residents. In 2014-2015 the enrollment of students not living in Oakland topped 40%, and the OSA leadership agreed without reservation that a key principle of the school was to serve the city in which it operates. This was not meant to undervalue the immense artistic and socioeconomic contributions brought by students and families from other cities, who also serve as informal ambassadors to spread the word of Oakland’s creative renaissance. Geographic diversity, coupled with cultural and economic diversity, is a rare urban phenomenon that OSA works diligently to improve and maintain. With these complex factors as a backdrop, OSA’s charter was renewed in January 2015 and is operative through 2020.

During their years at OSA, students complete a challenging academic curriculum while specializing in one of many artistic fields: Digital Media, Figure Skating, Literary Art, Dance, Instrumental Music, Vocal Music, Theater, Visual Arts, Production Design, with Audio Production and Engineering (APE) and Fashion Design emerging as discreet disciplines for 2016-2017. Five of these areas are high school programs only, giving the 8th grade graduates a rich array of choices for their high school years should they choose to audition for a new department.

The OSA faculty is comprised of professional artists and California State-credentialed academic teachers. OSA’s arts teachers are successful, working artists who create extraordinary opportunities for the student body. Students participate in formal and informal internships, professional gallery and museum exhibitions, and



high-visibility performances at notable venues like Oakland’s Fox Theater, Yoshi’s Oakland, the Leshner Theater in Walnut Creek and the Curran Theater in San Francisco. Established and well-known guest artists visit OSA through the invitation of the arts staff, to speak to and collaborate with students and faculty, and numerous high-impact community partnerships* continue to be fostered. In 2015, 93% of OSA’s graduating class transitioned directly into colleges and universities.

OSA has an annual operating budget in the \$9 million range. Approximately 80% of the funding comes through regular State allocations, with an additional \$1.6 million generated by a diverse range of revenue strategies, including an in-house Development Department that manages a portfolio of programs, the annual Governor’s Gala and a special arrangement with the Port of Oakland for a substantial annual contribution that is applied to the school’s Fox Theater tenancy. The Arts programs are largely supported by fundraising.

OSA strives to be, and in recent years has succeeded in becoming, a value-added resource for the City of Oakland, as a cultural asset, an attractive choice for families with school-aged children, and as an economic driver that generates, according to an unofficial 2015 fiscal impact analysis, \$1.2 million annually in the Downtown and Uptown Districts. In 2014-15 the school used 13 venues to produce 67 shows and events, attracting audiences that totaled over 16,000. In addition, OSA staff and board members serve on statewide and national boards and councils, and the school itself has been recognized locally, across the United States and internationally with various artistic and community-based awards. These are achievements rarely seen in a school whose history spans only 14 years.

With the school a visible and newsworthy entity that is continually in the public eye, in the years following the scope of this strategic plan – 2020 and beyond – a range of relationships need to be nurtured, both external (political, media, educational) and internal (teachers, classified staff, parents). This will help insure that OSA remains viable, independent and able to accomplish its mission in the most direct way possible.

C. MISSION AND VISION STATEMENTS

Mission

OSA will inspire its students to find their unique, powerful voices.

Vision

To give the world generations of innovative problem-solvers, creative thinkers, authentic leaders and ground-breaking artists, all of whom contribute to both the local and global communities, demonstrating the essential value of the arts in all we do.

D. THE OSA THEMES

Through the years, the OSA team developed an annual routine through 2014-2015 of choosing a phrase or saying to guide their efforts that year. Often buttons were made that staff wore to publicize the theme, and Digital Media also produced posters to further ingrain the idea in the consciousness of the entire school. Each phrase has a unique story as to its origin, refinement, and how it played out across the school year.

2008-09: Raising the Bar

2009-10: Defying Gravity

2010-11: Cultivating Excellence

2011-12: Cultivating Excellence

2012-13: Many Voices, One Spirit

2014-15: Passion and Purpose

2016-17: Breaking New Ground

The use of *Breaking New Ground* as the title of both the theme and the Strategic Plan is meant to reinforce the concept that we are entering new territory here that includes administrative changes, facility additions, enrollment increases and new processes and procedures, as well as a new attitude of operational and fiscal discipline and formality. The metaphor is apt for OSA in 2016-17: much needs to be uncovered before we can get to the core of certain issues, and while the work is going on it may get loud, dusty, and inconvenient – but in the end the growth and tangible improvements will have made it all worthwhile.

E. STRATEGIC GOALS

Over the next three academic years, ending in June 2019, OSA will continue to serve the Oakland community by providing a unique and enriching educational experience through its arts and academic programs. The school will ensure that its stability and legacy are proliferated by the support of a viable and sustainable financial plan. To achieve these goals, OSA will focus on growing its student body to 800 students from its current size of 725. This growth, driven by an analysis of audition data that revealed a substantial number of qualified students could not be admitted to the school because of space limitations, will be a planned and monitored effort that will focus on artistic qualifications and ethnic and socioeconomic diversity in order to emulate the demographics of the City of Oakland, and secondarily of the surrounding region as stated in school's charter. The students will experience an institution that is cultivating excellence at all levels and working to sustain it, and to make this happen the management and allocation of resources must be skillful and purposeful, fully aligned with the goals and values of the school.

THE STRATEGIC PLAN

GOAL I SERVE OUR LOCAL COMMUNITY

Serve the local community by attracting and retaining a diverse student body, and by involving the community in the life of the school, and the school in the life of the community.

GOAL II ACADEMIC EXCELLENCE

Achieve and maintain excellence in it’s academic programs leading to robust university acceptance and career success for students.

GOAL III ARTISTIC EXCELLENCE

Achieve and maintain excellence in it’s arts programs, leading to robust university acceptance and career success for students.

GOAL IV SUSTAIN THE SCHOOL

Ensure organizational stability by implementing mature financial, operational, organizational and development functions.

GOAL I: SERVE OUR LOCAL COMMUNITY

OSA will.

Serve the local community by attracting and retaining a diverse student body, and by involving the community in the life of the school, and the school in the life of the community.

1.a Examine the ethnic and socioeconomic data and identify the gaps between city and region demographics and those of OSA.

REGIONAL, COUNTY and CITY DEMOGRAPHIC DATA: 2015-2016

CITY/REGION	AA	Latino	White	Asian	2 +
Alameda County	12	22	43	26	xx
Contra Costa Co.	8	24	55	14	xx
Oakland	26	25	27	17	4
Richmond	22	39	26	14	xx
San Leandro	11	27	28	30	5
Hayward	12	40	25	22	xx
Berkeley	11	11	59	19	xx
San Francisco	6	15	42	36	xx

Since its move into The Fox Theater in 2009 and its increase in the student body from 300 to 725 students OSA has experienced declining percentages in the enrollment of students of color as more white and suburban students have auditioned and been admitted into the school. This follows a pattern that has been seen throughout the country with successful urban charter schools. Urban arts secondary schools have significantly higher socioeconomic status and percentages of white students than their local districts and in most cases even the cities in which they operate to a surprisingly consistent degree. There are some exceptions, however, and among them the one most worth studying may be the Boston Arts Academy. A group of OSA staff visited BAA in 2013 to view their senior thesis project, which we have adopted, and the diversity at all levels was apparent.

OSA ENROLLMENT DATA: SNAPSHOT MARCH 2016

Grade/Enrolled	AA	Latino	White	Asian	2+
6 99	17%	0%	45%	17%	16%
7 117	12%	3%	39%	12%	30%
8 113	13%	4%	36%	10%	34%
MS 329	14%	3%	40%	13%	27%
9 100	19%	6%	43%	5%	26%
10 105	23%	1%	43%	6%	25%
11 106	22%	4%	54%	1%	19%
12 86	21%	7%	44%	7%	16%
HS 397	21%	4%	46%	5%	22%
Total 726	130 18%	26 4%	315 43%	60 8%	175 24%

The enrollment data show a complex mix -- a definite trend (Asian students gaining admissions at greater rates, with 6th grade at 17% of the class, MS at 13% and HS at 5%), an anomaly (high rates of students identifying as Mixed in 7th and 8th grade, then dropping to 16% in 6th grade), steady lack of progress (enrollment of Latino students consistently low, with 6th grade containing none) and a surprise (the MS has a lower percentage of White students than the HS, when the belief had been that the lower grades had less students of color.)

As far back as 2011 the OSA Leadership Team set a goal that school enrollment would remain at least 40% students of color; at that time white students comprised 38% of the student population. The current 43% white enrollment indicates a 5-percentage point rise in 4 years; in 2016 OSA is 3% off the target. The data for the 2016 auditions acceptances, in the 6th grade, infused with the results of the outreach program in its new incarnation, are at once encouraging and puzzling, as the table below shows:

6 th Grade	AA	Latino	White	Asian	2 +
120 Students	18% 21 Students	16% 19 Students	47% 57 Students	13% 15 Students	7% 8 Students

Clearly the choice of selecting the “2+” category is the wild card here. In 2011 the 2+ or *Multi-Ethnic* category was introduced by State and Federal officials. Initially “2+” numbers were in the low single digits. After the first few years, the category began to gain strength at OSA, and the overall 24% reported for 2015-16 is considerably higher than any school in the region. Results of this sort are not surprising, Oakland has long been an influential force in statements of identity and culture. Analysis of the data indicates that of the 175 students whom self-identified as “2+” races, 63% had previously self-identified as African-American. If that number were included in the African-American total in 2015-2016, AA students at OSA would number 240 (33%), making them the second largest group at OSA and higher than the City of Oakland (26% -28%).

1.b Identify student recruitment and retention barriers and develop plans to overcome them.
(Executive Director, Diversity Coordinator, Outreach Team)

OSA has faced many challenges in matching its student body mix to that of the local community. These challenges are often other factors, rooted in traditional school attendance patterns for Oakland families; the lack of public transportation considered safe for students as young as 11 years old carrying instruments and art supplies; the elimination of arts programs from most East Oakland schools; unfamiliarity and inexperience with the application and audition process; and the refusal of many OUSD schools to allow charter schools to recruit their students.

In order to overcome this in the next three academic years, OSA will focus on contacting students and families through community centers, churches, after-school programs and by recommendation from those strategically supported art and music teachers who recognize that some of their students would benefit from the focused

and creative environment at OSA. Avenues are opening to support students for whom OSA could be the right choice, however, through new leadership at OUSD.

The data shows the ethnic group statistics for OSA’s Arts departments:

Art Dept	Afr-Amer	Latino	White	Asian	2+
MS Dance	39%		20%		38%
HS Dance	43%		36%	8%	8%
% of OSA	40%		31%	7%	23%
Digital Media	15%		43%	6%	33%
MS Instr. Music	18%	1%	35%	15%	31%
HS Instr. Music	28%	4%	23%	16%	30%
% of OSA	24%	2%	30%	15%	30%
Literary Arts (HS Only)	14%		54%	6%	21%
Prod Design (HS Only)	25%	6%	49%		20%
MS Theater	20%	5%	62%	9%	4%
HS Theater	21%	6%	49%		18%
% of OSA	21%	6%	56%	4%	12%
MS Visual Art	18%	5%	47%	14%	14%
HS Visual Art	14%	8%	58%	2%	18%
% of OSA	15%	7%	54%	8%	17%
MS Vocal Music	15%		42%	17%	22%
HS Vocal Music	26%	3%	40%	2%	25%
% of OSA	22%	1%	41%	9%	27%
Skating/Circus (14)	7%	21%	50%	14%	7%

- 1.b.1 The Diversity and Recruitment Team (established in 2014-15) will target East and West Oakland elementary and middle school-aged children through neighborhood (as opposed to school) contacts with an aggressive but non-exclusive effort to recruit students of color across all arts areas. developing a sustainable and coherent recruitment, admission and retention program.
- 1.b.2 The OSA outreach program known as “Step It Up” will offer free after-school and summer classes to connect underserved Oakland youth with specialized art instruction in the area of their interest or aptitude, taught by qualified OSA instructors paid by OSA.
- 1.b.3 Students in the Step-It-Up program will have their own audition and if admitted, will be assessed academically and artistically to determine what further supports are necessary to give them the greatest chance of success at OSA.
- 1.b.4 OSA leaders will be part of the Oakland charter school community effort to work with OUSD on areas of mutual interest, including recruitment, enrollment, calendar alignment and communication strategies to offer students and families the best educational choices.
- 1.b.5 OSA leaders will look into OUSD initiatives, such as the African-American Male Achievement effort, to determine if there are program connections that OSA could act upon to align with the AAMA mission and also serve its own strategic plan. *(Dean)*

1.c Develop a set of achievable, goal-specific metrics that will indicate whether or not progress was made toward Goal I. (SiU lead, SiU Admin Asst.)

- 1.c.1 Step-It-Up will reach 100 students/year, audition 80 and admit 20 (25% enrollment).
- 1.c.2 The school will achieve and maintain a representative ethnic mix across all grade levels established as close to Oakland city demographics as possible.
- 1.c.3 Using departmental demographic data, OSA leadership and arts staff will examine departmental statistics to determine the appropriate goals for each department in terms of size and diversity.
- 1.c.4 OSA will increase the enrollment of students qualified to be in the federal Free and Reduced Lunch program (in 2015-16, 14% of OSA’s students would have qualified) to a level determined through the process above.

1.d OSA’s performances are open to the public. We will ensure that a wide range of local officials, business neighbors and others are invited and attend OSA events. The newly established Arts Council will be part of this effort to establish official community presence at OSA in meaningful and authentic ways. (ED, Dev Dir)

1.e The visibility of OSA in the community will include holding many of its own events (State of the School address, Arts Council meetings, student shows) and also attendance at the events of other entities. OSA leadership will serve on Boards, panels, review teams, Task Forces both locally and nationally. The essential memberships that benefit OSA will be maintained: The National Arts Schools Network ; The California Arts Council and the Oakland Chamber of Commerce. (ED, CBO, Development Director, AD, SpED Director)

GOAL II: ACADEMIC EXCELLENCE

**OSA will . . .
Achieve and maintain excellence in it’s academic programs leading to robust university acceptance and career success for students.**

OSA must overcome a perception that has been consistently reported by a range of different stakeholders since the school’s inception in 2002: that the quality of its academic environment at the high school level is not rigorous enough for the kinds of students it would otherwise attract. More specifically, that it is not aligned with student and parent demand for challenging math and science programs. OSA traditionally loses between 25-33% of its 8th graders to other high schools. Exit interview data shows that nearly half the departing families are looking for more academic rigor than they believe will be afforded them at OSA. With that in mind, during the three-year period of this plan, OSA will analyze the current conditions and create systemic solutions to the challenges in the substance of the academic program, as well as those that are largely a matter of public relations.

In 2015-2016, attrition across art disciplines trended as follows (Total = 89):

Arts Emphasis	Circus Arts	Dance	Digital Media	Instrumental Music	Production Design	Theater	Visual Art	Vocal Music
Students	4	50	37	119	49	155	148	119
2015-16 Attrition	1 25%	7 14%	2 5%	11 9%	5 10%	31* 20%	15 10%	10 8%

*Exit surveys show in the 16 of 27 students who left the 8th grade theater class a split between loss of interest in the art form and the desire for more academic rigor as the reason for leaving. The overall 20% Theater Dept. departure rate triggered a deep look at the conditions that may have led to this and recommendations that will help Theater are embedded in this document

2.a OSA will develop internal processes that analyze conditions to set a direction for continuous improvement and quality enhancement. The primary focus will be on enhancing math and science programs, although any area of the school that indicates growth is needed will be addressed by Year 3 of the plan. (ED, Principals)

2.b As the process uncovers areas of need, teams comprised of the involved OSA staff will address the challenges with an eye toward systemic improvements on both the long and short term levels.

2.b.1 2016 – 2019 Initiatives for Academics Programs:

- Science (Biology and Chemistry) classroom laboratory enhancements *(Middle School and High School Principals, CBO, Science Department Chair).*

- Appoint STEAM coordinator (Science-Technology-Engineering-Arts-Mathematics curriculum) to oversee lab conversion, activities, enrichment for advanced students, new coursework (The Art of Science as a 9th grade course) and possible AP Science offering.
- Ensure that Science and Math staff are given ample time to plan, collaborate, design and monitor progress of student achievement in those subject areas through the Monday early release PD program; adjust the master schedule to allow for the Science chair to have time for classroom observations and teacher meetings.
- Effect a Physical Education program overhaul: facility procurement and/or community partnerships with rock climbing gym, ice rink, sports leagues; City of Oakland Parks and Recreation. (*Middle School Principal, PE Faculty*).
- Host early (October/November) academic Open Houses for parents of OSA 8th graders with a specific emphasis on demonstrating the improvements in math/science spaces and course offerings. (*Middle School and High School Principals, Admissions*).
- Host Open Houses for prospective students and families with the same emphasis on math and science coursework and facilities (*as above*).
- Reformat 7-year math program to allow for students to enter the math curriculum at a level commensurate with their abilities (*Middle School and High School Principals, Math Chair*)

2.c Develop a set of achievable, goal-specific metrics that will indicate whether or not progress was made toward Goal II.

- 2.c.1 Ensure, through parent communication, Open Houses and program development aligned with student and family needs, that retention from the 8th grade to the 9th grade exceeds 75% annually, and that retention in the Theater, Visual Art and Instrumental Music programs reach this goal as well.
- 2.c.2 Student achievement measures will reach levels commensurate with student potential as measured by student grades in academic classes at OSA. In State standardized testing, levels will be commensurate with State expectations for OSA derived from baseline data collected in 2015 (actual levels to be determined in summer 2016).
- 2.c.3 Advanced Placement, SAT and ACT scores will reflect that OSA students are eligible for the colleges they selected and commensurate with their academic standing at OSA.

2.d The school leadership and the faculty will jointly design and execute a Professional Development plan that will support the needs of teachers, include many facets of PD (outside experts, collaborative time, in-house presentations, readings and reflections, Departmental and Division time). A faculty PD coordinator will be paired with a lead administrator to ensure teacher needs are expressed in the program design. Formal program evaluations will be done at the end of each year.

2.e Students with learning needs and differences will be placed the correct system or process, and will receive their mandated services, as well as others we have instituted.

GOAL III: ARTISTIC EXCELLENCE

OSA will . . .

Achieve and maintain excellence in it's artistic programs leading to robust university acceptance and career success for students.

OSA has many successes to celebrate: many families report that the public acclaim the school enjoys in the arts, and the elation felt by their own children toward the school, was something that could not be undervalued and was their primary reason for continuing at OSA after middle school. The Oakland School for

the Arts artistic program is a bold and eclectic effort, driven by a range of factors that include the city and region in which it operates. The interest and prior experiences of the students, the political climate of the times *such as Occupy, Black Lives Matter, Social Justice, International Blvd. and Immigrants' Rights* have been utilized as subject matter through a theatrical piece, a pop music performance, Literary Arts readings, an award-winning documentary video and Visual Art/Digital Media displays.

The Arts curriculum is guided by OSA's experience, the vision of the Artistic Director, the specific expertise and artistic orientation of the Arts faculty, and only somewhat from what in most arts schools is the dominant artistic force - the Western Canon of artistic and musical tradition, the European 'high arts' from The Renaissance onward. Among schools looking to attract and retain a diverse set of students in the Millennial Era OSA is in the unique position of being staffed by a young, urban arts team that has extensive classical training and yet is affiliated with local groups and working on individual projects across all genres – a classical violinist with a hip-hop group, classically trained pianist putting out a highly-regarded jazz CD, a World Music vocalist, a Composition M.A. composing a jazz/classical fusion piece, various modern theatrical adaptations of classical pieces (The Trial, The Oresteia). The classical tradition is honored as both a developmental asset for the young artist, and also for the compositions and aesthetics in their own right – just not exclusively. As compared to other arts schools which appear on the Schools Comparison addenda, OSA has a more student-centered orientation, less of a fixed curriculum, yet still retains a respect for the fundamentals of each craft as is evidenced by Visual Art *boot camp* where six weeks of pencil drawing from life opens each school year; instrumental music still does juries to make sure the playing of each individual is heard; ballet routines are part of each dancer's day, through they rarely perform ballet; actors are versed in Stanislavski, Chekhov, Shakespeare, Stella Adler – the influences brought to bear on the young artist are wide-ranging and mind-opening. The priorities, goals and action items that follow are designed to take a first-rate arts program that is fresh, rigorous, relevant, ever-evolvingand to continue creating the conditions where this flourishes.

3.a OSA will develop internal processes that examine, record and analyze conditions at the school to set a direction for continuous improvement and quality enhancement. The primary artistic focus will be on enhancing the arts curriculum to ensure student growth is supported across a 3-, 4- or 7-year continuum.

3.b OSA artistic leadership will use existing teams (*Artistic Director, Arts Chairs, Leadership Team, the future Arts Council*) to study, analyze and develop plans to infuse the arts departments with cutting edge ideas and necessary facilities and equipment to maintain their level of excellence.

3.b.1 2016 – 2019 Initiatives for the Arts Programs:

- Develop a departmental handbook that outlines 7-year curriculum for all arts disciplines (*Arts Departments, AD, ED*).
- Develop two Arts Shadow Days for 8th graders in quarter 2 (November) and quarter 3 (March) wherein 8th graders follow 11th graders' afternoon schedules (*Admissions, Arts Staff*).
- Construct and/or adapt an arts evaluation or assessment rubric that can be used school-wide to gauge quality and aesthetic value, as well as determine educational uses and departmental growth plans (*Arts Departments, AD, ED*).
- Establish or accelerate partnerships with a range of institutions, beginning locally. Partners should be active participants in school events, galas, performances, and be cultivated to for groups that are of mutual benefit to the school.
- Define the role of the Artistic Director to include any producing opportunities or expectations.
- In Visual Art, Instrumental Music and Production Design, ensure that appropriate facility enhancements are planned by Year One, completed by Year Two, and fully implemented by Year Three in order to support artistic output goals.

3.c The Artistic Director, working with the arts dept. chairs, will design and implement a Peer Observation and Feedback system in which arts staff view the same work together, a

minimum of three times yearly, and afterward join in a process to analyze and reflect, and to find school-wide best practices that can be disseminated and employed in varied settings. (Artistic Director, Arts Faculty)

- 3.d The Arts Advisory Board, consisting of up to a few dozen local and regional arts leaders, will have a kick-off event in 2016 that will include an invitation to the Council, attendance at an OSA event or performance, and a round table discussion and brainstorm around the future of the Council and how it can support the arts in Oakland and the County, as well as advise OSA on artistic matters and other related initiatives. (ED, Development Director, AD)**
- 3.e A system will be developed so that artistic offerings, schedules, calendar dates, venue usage and other foundational processes are clearly delineated, and the school can set a calendar in March for the next school year that can remain constant. (ED, AD)**
- 3.f The choice of artistic work to be presented, and on which students will receive the majority of their training, will be for the most part the responsibility of the Artistic Director and the Chair of each Art School. Each spring, in discussion over what will be offered in the upcoming year, the Executive Director and the Artistic Director will ensure that the artistic choices are aligned with the core values of the school, both ethically and aesthetically, and that the cultures and backgrounds of our students and families are represented in the work we present.**
- 3.g The arts will be supported by these functions:**
- 3.g.1 Chief Business Officer and Facilities Manager will proactively inspect and repair any facility-related problem, and will stay within maintenance budget. Upgrades, additions, changes will also be handled by CBO and FM.
 - 3.g.2 The Artistic Director will work with different arts departments on budgets, staffing, room usage, management of restricted funds, scheduling, and the creation of a joint Fox Theater event at least every other year.
 - 3.g.3 The Development Director will guide department chairs to the use of appropriate development strategies if funds are needed over and above regular allocations.
 - 3.g.4 The Director of Operations will continue to provide logistical support to the Arts Departments for meeting schedules, agendas, follow-up items, compliance issues, and anything related to the smooth operation of the department.

GOAL IV SUSTAIN THE SCHOOL

OSA will . . .

Ensure organizational stability by implementing mature financial, operational, organizational and development functions.

OSA is at a tipping point in its history. We have accomplished a great deal, including a turnaround during the period of financial and operational duress in 2007-2009. In 2016-17 OSA is maturing from the highly reactive and entrepreneurial organization of its youth to one where stable and well-understood processes will be necessary for continued healthy operation and growth.

As of the end of the 2016-17 school year OSA is fundamentally sound. We have multi-year leases, a strong, mission-driven team, and money in the bank. This Strategic Plan recognizes that OSA needs to review assumptions and processes across the board to protect our mission and continue to be a sustainable enterprise. A number of drivers make 2016-17 the time to evaluate how we can surge forward

1. Our historically transactional and situational approach needs to mature to one where we implementing more repeatable, explainable and defensible (“RED”) processes while actively preserving OSA’s entrepreneurial culture.
2. Budgeting becomes much more complicated as the school grows. The process should start in February, early in the second semester. The time is right to move some fiscal ownership to the Principals and Arts Leadership. We will need increased budgetary discipline while holding on to the essential elements of our culture that make OSA unique.
3. Our facilities are leased for relatively short terms, yet we are making large capital investments. Except for the Fox, local rents are likely to spike dramatically. Our landlords may be reluctant to extend our leases past five years. We need a thoughtful process to evaluate the return on improvements to buildings, and update lease arrangements accordingly, or develop contingency plans.
4. Our entrepreneurial approach to growth has produced excellent results. At our size and complexity now we need a strategic "green lighting" process to provide a RED method for evaluation and approval of program and campus expansion. The process needs to include a mission alignment test that includes the board, as well as impact analysis on finance, facilities, academics, arts, development and sustainability.
5. Like many successful urban charters, we are serving students and families with more resources and more options. OSA leaders and board need to get clarity on the impact on our mission on this and other factors. In our attempt to increase diversity at the school, there is a possibility that more costly supports will be necessary. But OSA was in part established to serve this community. The current support model is adequate for our relatively affluent student body. We need capacity to incorporate students with new support needs. 2016-17 will be key in that the OSA Diversity Task Force and *Step It Up* team was able to recruit a significant number of targeted students, many of whom will likely need supports.
6. Our Academic program will require continued work to reach the fullest degree of excellence the school so richly deserves. Our Middle School and High School Principal run their academic programs and collaborate well in deciding upon curriculum, materials and direction, but the current academic structure has no Academic leader focused on the breadth of the school. . The new role of Artistic Director will develop standards for the arts curriculum as well as the current role of performance leadership. The school leaders will examine roles, goals, and organization structures for effectiveness and possible hierarchical shifts.
7. Within this leadership discussion, the acceleration of academic rigor for an advanced track of students, pressure the school is facing now, must be carefully considered in terms of cost, cultural impact and community impressions of the school.
8. With the Governor out of office after 2018, our largest fundraising source will be significantly diminished. Our expense management discipline will need to be honed in preparation for leaner times. Philanthropic support from the Board will need to rise significantly, so board building should be a high priority in the next two years. The second half of the third year of this strategic plan (Spring 2019), the governor will not hold office.

Fortunately, we expect California schools to continue to be funded without cutbacks or deferrals (which affect Charters much harder) for at least the next two years. In 2016-17 we expect funding levels to increase slightly due to an accelerated schedule for closing the gap between LCFF Funding goals and actual General Fund apportionments to schools. Our stage of growth combined with current adequate academic funding offers us an excellent opportunity to study, evaluate, and refine our fundamental processes in Academics and in Operations (finance, human resources, facilities, campus safety, technology, student information and records, external reporting, and general administration).

As we think about improving organizational, operational and financial performance we will have the time to be thoughtful and intentional about the systems and processes we add, change and delete. Our efforts now will better prepare us for any possible future downturn in public school funding.

4a. OSA Operations and Finance teams will develop and refine operational and organizational processes to improve stability.

- 4.a.1 OSA's finance team will establish formal fiscal policies and procedures. We will streamline transaction processing and create time for ongoing financial management including budget analysis, monitoring key indicators and supporting financial decision-making.
- OSA's will apply The Fiscal Crisis and Management Assistance Team's (FCMAT) Fiscal Health Analysis tools to evaluate our health against common charter school challenges.
 - Our budgeting function will increase in transparency and predictability by being deployed to Principals and Budget Owners. The budget process will be moved earlier in the school year and curriculum decisions will be made with a clear understanding of fiscal impacts.
- 4.a.2 We will evolve our current Human Resources function from a largely transaction-driven role to a strategic role with a mission of finding, developing, and retaining "Best People." as the guiding Strategy:
- Enhance the quality of the faculty and staff through effective recruitment of a blend of teachers at varying experience levels.
 - Career advancement and compensation improvement opportunities for educators within OSA will be explored.
 - Review our compensation systems with a goal of increasing teacher compensation whenever possible.
 - Implement transparent RED (Repeatable, Explainable, Defendable) salary structure that formalizes the salary schedule of the school.
 - Maintain an intentional focus on building and cultivating diversity and inclusivity at all levels of staff and faculty.
 - Improve retention of high performing teachers through professional development and support, and recognition.
 - Early recognition of teachers in need of support and effective instructional leadership.
 - Effective supervisory training for leadership positions, including leadership theory.
 - Build infrastructure and support systems for collaboration across departments, Arts and Academics and between MS and HS.
 - We will develop appropriate measures to track, manage, and report against HR goals in the areas of:
 - Teammate Satisfaction and Retention
 - School Culture
 - Diversity
 - Professional Development
 - Process and Administrative Accountability
 - We will conduct a strategic analysis of our organizational structure with a focus on alignment of goals with roles for our employees. We will conduct a review of administrative and support functions, and an analysis to align jobs and activities with school goals.
- 4.a.3 The facilities function will develop a guiding principle of obtaining "Effective Facilities" with long-term utility that justifies investments in maintenance, improvements and FF & E.
- Our current approach to facilities maintenance is highly responsive and customer-oriented. We will apply the disciplines of site inspection developed by Office of Public School Construction (OPSC). Using a standard facility inspection tool (FIT) we will identify where our buildings fail the standard of "good repair" and prioritize repairs accordingly.
 - New projects and capital improvements will be defined and planned in partnership with Arts and Academic leaders. We will deploy project management fundamentals and progress reporting, and create an organized system of information and work flow.
- Facilities Expansion has been an organic and opportunistic process that has served the school well, as the needs were obvious and nearby local facilities were available. The original vision of populating downtown Oakland with the energy of young arts students has been enhanced by the students walking from facility to facility: with their sketchbooks and instruments, video cameras and Chrome Books, they are clearly arts students. Still, the leasing of different facilities in varying states of repair does present challenges in developing upgrade plans and

deploying personnel. Our preliminary list of facilities upgrade projects (mostly non capital) includes:

Need	Priority
Whitebox Lease	Critical
Main Campus Load Factor Study (to support growth plans)	Critical
Whitebox Sprinklers	Important
Whitebox Egress	Important
Sweets Stage Structural Improvements	Important
Sweets FF and E Upgrades For Instruction	Important
Sweets Faculty Restroom	Important
Sweets Acoustics Improvements For Instruction	Important
Newberry's Blinds and glass replacement (acid damage)	Important
Newberry's Bathroom Upgrades	Important
Newberry's "Vibrant Retail" installation	Important
Main Campus Blackout Shades for Student Center	Important
Sweets Office Space Upgrade	Optional
Sweets Green Room	Optional
Sweets Curb Appeal Upgrade (Box Office, Signage, etc.)	Optional
Sweets Carpet Replacement	Optional
Sweets Blinds at Mezzanine Level	Optional
Newberry's Façade improvement	Optional
Newberry's and Sweets - Riot Proofing	Optional
Newberry's Classroom Lighting Improvements (TBD)	TBD
Main Campus Internal Shades - 3 rd Floor	Optional
Main Campus Internal Shades - 2 nd Floor	Optional
Main Campus Painting (2018 Planning Horizon)	2018-19

- 4.a.4 Our technology function will expand from only supporting hardware to include "needs analysis" processes for new and improved information systems.
- Early systems improvements will include an Employee Self-Service tool for benefits, a File Sharing system for collaboration, and an evaluation of options for improved email and calendaring tools.

4b. OSA CBO will drive efforts to evaluate the organizational stability and sustainability of the school and will develop sustainability policies and plans to support wise and intentional growth in facilities, enrollment, and programs.

- 4.b.1 Our finance function will build a sustainability model focusing on cash flows and balance sheet health over a 5 year projection.
- 4.b.2 Our finance function will develop standards for reserve requirements, contingency plans for funding cutbacks and/or deferrals, and reserve approach for unanticipated facility expenditures.
- 4.b.3 Our facilities function will examine risks and options for program expansion and facilities and drive the development of a strategic Greenlighting process.
- 4b.4 Our HR function will work with academic leaders to develop a strategic hiring and compensation model focusing on blended skills among educators.

The Strategic Plan illuminates the need for OSA to build a sustainable Advancement program to carry the school into its next phase of existence. Understanding the change from development to advancement and the high-level fund development goals for the Annual Fund, Board Benefit and especially the Gala over the next 2-3 years is key so that the team can be structured accordingly. The goal of the Development Department over the next three school years is to raise a total of \$2,500,000 (inclusive of both restricted and unrestricted funds, the former earmarked for specific projects or programs) to support OSA in meeting its overall objectives, which include sustaining world-class arts and academic programs, maintaining and enhancing our historic buildings, and contributing to the costs of arts teachers' salaries.

For 2014-15, Organizations, Foundations, and Corporations accounted for the majority of unrestricted donations to OSA, totaling 60% of total dollars contributed. Comparatively, Foundations and Corporations

made up just 20% of total philanthropic dollars in the United States in 2013, as reported by Giving USA's 2014 Report. This difference points to the unique nature of the OSA fund-raising environment: with its founder connected to the high level world of Organizations, Foundations and Corporations, OSA reaps the benefits of these relationships in a significant way. The challenge becomes sustaining something close to this level of funding once the school attempts to accomplish this without the founder's direct involvement. This pattern of heavy Organization, Foundation and Corporation support will be examined by the Development Department with an eye toward bringing that ratio into a more expected range as the school transitions from its founder-centric approach.

Speaking to the efficiency of the current fundraising model at OSA, the cost of the department per fundraising dollar in 2014-15 (inclusive of salaries + benefits) is \$.13, well below the national average for most organizations of \$.20-\$.28 per dollar according to the Association for Fundraising Professionals.

Currently the Development team is comprised of two staff members: a full-time Development Director and a full-time Development Associate. The team works closely with the Development Committee, meeting once every other month or as necessary. The current OSA Development Committee – comprised of the OSA Development Director and three Board Members – was initiated at the close of 2013-14 and continues to meet throughout the school year. The team meets to check-in about goals and strategies, and to provide necessary guidance and support in the growth of the department.

4c. The OSA Development Team and the school administration will conduct a thorough analysis of donor patterns and develop plans and strategies based on the findings.

4d. The Development Team and Committee will develop plans to generate revenue for the next three years to include: events for specific projects (*i.e. Production Design, new music wing, recording equipment); the Board Gala, the Governor's Gala; the Annual Fund; Grant-Writing, stewardship of current donors; development of new prospects.

- 4.d.1 The team will be appropriately supported in their efforts by either supplemental personnel for event planning, data entry, and other tasks, or alternately new permanent staff will pick up some of these tasks.
- 4.d.2 The team will begin the transition from the Governor's Gala to a new event that will encompass those gala donors still connected to the school, the Board of Directors and their guests, and the local business and philanthropic communities. This will conflate the current two-gala model into a single annual event.
- 4.d.3 The Individual Giving Program will be further developed as a strong source of funding for the school. Thus too will be part of the strategy to transition from the current heavily centralized Governor's Gala model to a more diverse set of funding streams. The various streams will be strengthened through strategic activities that may include small house parties, talks and demonstrations through the newly formed OSA Arts Council, direct management and enhanced focus on the Annual Fund, and special events for specific projects that require funding.

4e. The purchase of a new donor data base will be explored with the following values in mind: ease of use; ability to produce clear reports quickly; customizable to OSA's specific needs; company responsiveness to training and help requests; ability to interface with other programs; component features that allow for minimum purchase at first to be supplemented later.

Below is a snapshot of year-to-date fundraising activities and results for 2014-15 and three years prior. Following is a chart indicating future fund-raising goals, and finally a narrative describing each fundraising activity.

Event	2011-12	2012-13	2013-14	2014-15	2015-16 (Goal)
Governor’s Gala	804,739	908,700	1,055,159	857,751	750,000
Annual Fund¹	129,040	167,533	207,037	289,275*	300,000*
Board Benefit	35,187	22,224	32,438	50,070	50,000
Grants	547,883	31,849	84,465	71,144	80,000
Board Membership	6,800	6,500	9,400	10,800	17,500

* indicates OSA has included restricted Funds in this category.

Governor’s Gala

The Governor’s Gala is historically OSA’s largest fundraising activity and was previously managed by VentureSpark. The Gala is held in the Spring of each year. In 2014-15, the event was managed in-house for the first time by OSA Development and raised \$860,000, \$210,000 over the goal. Gifts ranged from \$500 - \$100,000 and the total cost to produce the event was \$21,079. The average and median gift sizes from the Gala are: \$11,913 and \$5,000. The goal for 2015-16 and for the three years following, through June 2019, is \$750,000.

State of the School/Annual Fund campaign

The Annual Fund campaign continues to be the second highest-grossing activity. The campaign kicks off in September with the State of the School address, delivered to the entire staff and parent body over two nights by the Executive and Artistic Director. This has been an OSA tradition since 2010, signifying the start of the school year by illuminating the goals and themes for the year, and it runs through June of each school year. To support the campaign, Development initiates three Direct Mailings throughout the year (October, November and another in April) to families who have not yet contributed, and writes unique copy for all solicitation and acknowledgement letters.

In order to promote a culture of giving, in 2013 the Development Dept. instituted Giving Circles, with specific benefit packages assigned to the different levels. In 2013-14, we saw 52% participation in the Annual Fund campaign, whereas in 2014-15, we saw 41%. When restricted donations are considered (those specified for a purpose or department), we had 63% participation. The average and median gift sizes to the Annual Fund are \$700 and \$250, respectively.

Over the next three school year periods, Development will strive to increase individual giving at all levels of \$1,000 and above, but particularly at the \$2,500 level and above. In addition, Development will “Poll” the Annual Fund giving community to explore their stewardship experience at OSA (dinners, appreciation events, benefits packages, etc.). Their feedback will determine the appropriate approach for next year.

Fundraising goals for the Annual Fund in school years ending June 2017, 2018 and 2019 are \$300,000, \$325,000 and \$350,000, respectively.

Board Benefit

The Annual Board Benefit is a special Board-driven fundraising event that yielded \$50,070 for the school year 2014-15 in which greater participation from Board members than in the two years prior was evident. Communications were primarily managed internally, with specially designed invitations and donor cards from Digital Media students, and an event webpage created by Development. OSA’s Schools of Instrumental and Vocal Music performed at the event with a special guest musician. The total cost to produce this event was \$8,240. OSA’s goal for 2015-16 was to raise \$50,000 and that figure will remain the same for the three years

covered by this plan. The longer-range plan as outlined in 3.b.3 creates a transition period in which the Governor's Gala and the Board Gala become a single event that provides stewardship and connectivity between all the donors and at that time the fund-raising goal will be in the \$250,000-\$300,000 range.

Institutional Grants

Due to capacity limitations, grant writing efforts have been strategically and carefully planned. For the past three years, OSA's Development Director created a grants pipeline for which to track applications, reporting and Letter of Intent submission dates for new and existing prospects.

In 2015-16, the Development team hired a Development Associate with grant writing skills, to focus on the pursuit of Foundation relationships \$5,000 and above in support of special projects and programs (Step it Up, Artists in Residency, Arts Departments needs, Poetry Out Loud) and \$25,000 and above for general operating support.

Board Membership

Each fiscal year, the Board is asked to make the expected membership contribution of \$1,750 to OSA. In the past four years, Board membership has ranged from 33% to 77%, landing in 2015-16 at 54%. The \$1,750 represented the per student cost of budget needs over and above the State allocation. In recent years, with school growth, the economy of scale kicked in and eased the burden of supporting certain programs without direct funds.

Tracking Restricted Gifts

It is important to track this information because the vast majority of these gifts are made during the State of the School/Annual Fund pitch at the start of the year. In 2014-15, nearly \$80,000 in restricted donations was received. These funds are independently managed by Department Chairs in partnership with appointed parent volunteers. In the coming years, as the Development team grows, the department will assist the arts and academic departments with grant writing or other fundraising efforts. In 2014-15, Development required that all arts departments create a clear budget with "wish lists" to help prepare for and streamline fundraising efforts. This practice will continue in future years, systemically tying fund-raising to specified projects and curriculum.

- 4f. The Development Committee will assess the state of the Development Team and recommend to the full board a staffing scenario commensurate with the needs of the school. The concept of a major gifts officer will be explored, as will the need for an event planner.**
- 4g. To build and strengthen the OSA development program for the future, the following will be considered: the establishment of an Advisory Board that will serve as outside eyes and ears for the Board; a speaker series or other Thought Leadership events that position OSA at the cutting edge of arts education and community involvement; a Community Outreach staff position, either within or outside of the Development Department; and an Alumni Council with a representative from each graduating class.**

Major Gifts Officer, Arts Advisory Board and Event Planner for 2016-17

The Development Department must determine the level of involvement of the founder through June 2019. This information will help to define OSA's Major Gifts program strategy. Major gifts will be defined as \$5,000 and above coming from individuals. Stewardship and strategic designing of benefits for these donors must be a vital part of the strategy. Other facets of this position could include:

- The creation of an Arts Advisory Board of high-level donors with deep arts involvement or appreciation to advise and guide the school, as well as introduce new individuals to the school as possible contributors and participants in school activities.
- A speaker series, perhaps 3-4 events per year that will feature dynamic leaders in arts-related fields.

- Organizing events to expand the donor base and steward current donors.
- Assisting the Development Director in crafting a long-range donor stewardship and recruitment strategy.
-

An Event Planner should be part of the team, perhaps on an event-by-event basis, to ensure the time of the DD is not consumed with planning and executing the events associated with Development activities. The Arts Council or Advisory Board concept, while not new, may be one of the keys to the new era for OSA. The school is considered an open and enthusiastic partner by its local affiliates, but the Council can provide a more formally designated forum for the exchange of ideas and even deeper collaborations. Given OSA's position within the Oakland arts eco-system, being the hub of a strong and aligned citywide artistic leadership group makes perfect sense as the next step in the school's evolution from renegade start-up to darling of the establishment. In Oakland, of course, the 'establishment' is gloriously rebellious and would be a fringe group almost anywhere else

F. CONCLUSION

There are cities in the world that become associated with certain artistic movements or styles or genres. In the second decade of the millennium, there is no shortage of these types of associations: Berlin for cutting edge video and visual work; Venice for the outrageous Biennale; Ubud, Bali for batik and palm frond funeral arrangements. There are many more examples of the arts as a cultural driver, economic engine and artistic expression of its city's values and aesthetics . . . , , and then there is Oakland, California in 2016.

Oakland is a city that begs for a new vocabulary – its uniqueness, its juxtaposition of disparate elements make traditional phrasing seem trite and inadequate. Some of the most iconic renegades in American History are associated with Oakland: The Hells Angels, The Black Oak Riders, the Black Panthers, even our own football team, the Oakland Raiders, has a definite aura that says Oakland. The *Oakland School for the Arts*, even with more than a third of its student population residing outside the city limits, is expected to look like Oakland and produce work that represents Oakland. A detailed description of exactly what this artistic output means to the world we will leave to the Arts Council and another written treatise; suffice to say there is no shortage of examples of the Oakland brand in the world, be it *Ledisi*, *Goapele*, or *Marshawn Lynch*, not to mention our own *Zendaya*, *Kehlani* and *Vocal Rush*.

In its 14th year, OSA has become a substantial institution somewhat removed from its start-up mentality and entering a phase of reflection and process development. With a charter and WASC accreditation both running through 2020, leases on annex facilities secured until 2021, and with increasing popularity among the parent communities of Oakland and beyond, OSA is poised to solidify its future and increase its financial capacity through this strategic plan and the implementation of its thoughtful strategies. The actions we take will be viewed through the lenses of a variety of stakeholder groups: the Board and school leadership, teachers and the clerical staff and security crew; families and extended families, and students, from prospective through alumni; local community and business coalitions are also part of the equation. Schools, and OSA in particular, are complex places, affecting many people and groups, and subject to scrutiny and input from the public at large in ways that few other institutions face. OSA has benefited from community involvement in the areas of fund-raising, expertise for special projects, ample publicity, large audiences for shows and direct contact with the media, who run numerous OSA stories from a variety of perspectives. This is a strength on which the school needs to capitalize, because the challenges defined below can be significantly impacted by the contributions of the larger community. The OSA message needs to be heard throughout the region: We are an arts resource and beacon for the city of Oakland, and your contributions (in whatever form) are an investment in a major civic institution that will affect your children and grand-children, as well as your economic viability.

The challenges that OSA will face in the near and middle future are numerous. One of them is the unpredictability of the challenges themselves. State funding for K-12 education looks as strong in 2016 as it has in decades, the robust economy is reflected in donation numbers, and the charter school movement, while under attack from teachers unions and other political factions, seems strong and continues to produce more charter schools. Still, any of these factors could turn in a moment, and long-range planning in the public K-12

environment beyond three years is often a futile exercise.

The four goals emerged from the focused reflection undertaken by the Board and the senior staff, a reflection that was informed by knowledge obtained, in most cases, after many years with the school. The aspirations of the staff, in a constantly shifting environment, have been a surprising constant: to educate a diverse group of creative students who demonstrate commitment and show growth, in an exciting urban environment that is free, during the school day, of distractions and interference. In late 2007, after yet another leadership change, the staff was polled as to what they expected from their leadership, and 61% listed competence as their first choice. The message was clear: we know how to do this work, we are growing daily, and what we need is a structure in place that is balanced, consistent, and can bear the weight of what we are attempting to do. Fifteen employees out of forty-two remain from that time, and now represent only 14% of the 110 who comprise the 2016 staff. Yet the institutional memory and foundational knowledge of this core group is powerful, and helps to keep the school grounded. That early message should not be forgotten. Competence may seem to be a low-level prerequisite for the greatness to which this school aspires; still, it is not a given and must be worked on each day.

Some of the essential outcomes OSA has agreed upon will be achieved in ways that require an enormous amount of collaboration: top-tier college acceptances and high 4-year university percentages; attracting a diverse student body; superior achievement statistics as measured by standardized state test scores, SAT/ACT scores (with continued growth in mathematics and increasing rigor in the sciences); flawless graduation rates and minimal formal disciplinary action; robust financial health including budgetary precision, fundraising success and strategic resource allocation; and of course the creation of profound and aesthetically sophisticated works of art in all of its art schools. In recent years, as one of the school's WASC priorities up until 2014, staff collaboration rose to the top as one of the three pillars in that previous era. It still lives now in Core Value #3. If any single factor could portend the success or failure of the school achieving the goals of this plan, it may very well be the ability of staff to collaborate, to work together to reach not the often watered-down consensus that passes for agreement, but a synthesis of complex ideas that may at first seem mutually exclusive, but through creative problem-solving and a growth mind set become the parameters of a higher level of thought and a broader scope of leadership.

Each of the constituent groups within the school will make a contribution to the goals laid out above, and ultimately the resources at hand for OSA will be deployed in the interest of making progress on those goals. There will be action items to attack and checkpoints at which progress will be measured. OSA is well-situated to take the findings and direction of this Strategic Plan and accelerate the school to its next level of excellence and relevance. Its leadership, when inspired by the vision of the future – to give the world generations of critical thinkers and innovative problem-solvers who demonstrate the essential value of the arts in all that we do – can steer the action items through the narrows to come out the other side intact and flourishing. But for that to occur it must see the world clearly, act with imagination and purpose, and develop the skill to adjust on the fly without compromising the school's goals and values. In other words, the OSA leaders should embody the qualities defined in their own vision statement: creative problem-solving is to the millennium what continuous improvement was to the 1950s.